

NEXT-GENERATION JOBS TEAM (NGJT)

85% Recovery Act Formula Funds
15% Governor's Discretionary Funds

**Youth Toolbox 2.0 Desk Aid
(plus Addenda)**

NEXT-GENERATION JOBS TEAM (NGJT)

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Youth Toolbox 2.0 Desk Aid (plus Addenda)

Enrolling Youth in the NGJT Programs

To enroll a job seeker in the youth program, they need to have an active registration. Reference the Job Seeker Registration desk aid for directions on how to register a job seeker.

To be considered a “complete” job seeker registration, the following tabs must be completed:

- Basic
- Vet/Mig
- Desired Emp
- Job Info and Emp His.

To enhance the job matching system, Education and Skills tabs also need to be completed.

Registering a Job Seeker

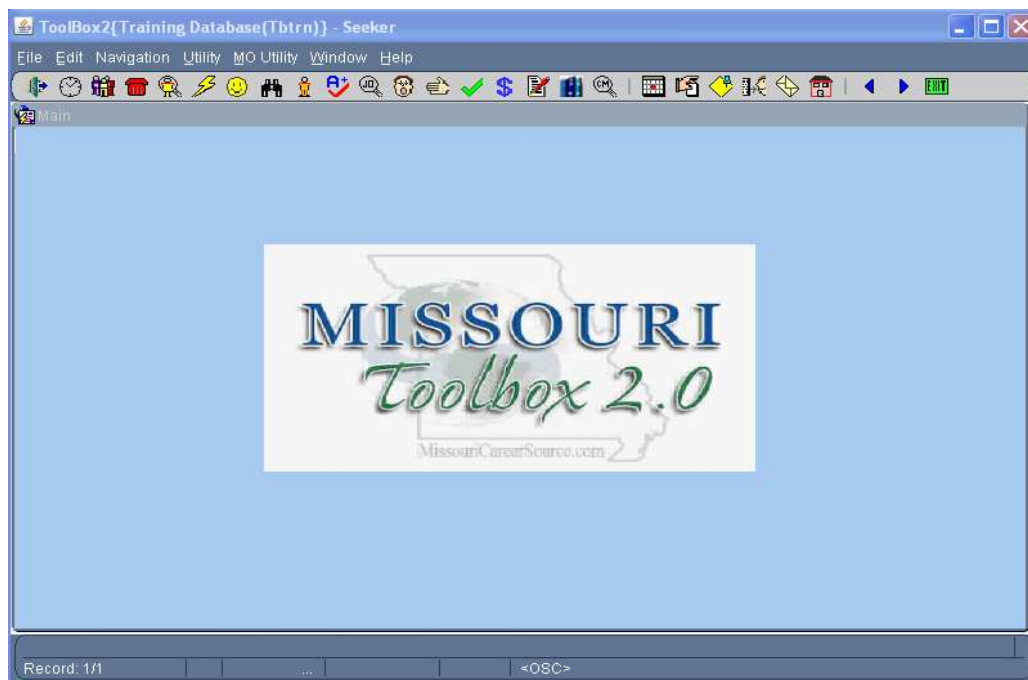


Figure 1: Toolbox 2.0 Seeker Screen

Step-by-Step:

- 1) To begin a job seeker registration click on 😊 **Seeker Entry Screen.**

Figure 2: Seeker Entry Basic Screen

Step-by-Step:

- 1) Follow the cursor to each field and enter the seeker information.
- 2) Click on **“Save”** button.

REMINDER: As the cursor is moved to each field, read the **“Help”** field at the bottom of the screen for what is needed, Ex: mm/yyyy, mm/dd/yy. Click on F1 for more help.

NOTE: The Veteran & Migrant Staff screen is used to enter veteran status information and migrant worker codes. **(Refer to Veteran’s Desk Aid)**

***Figure 3: Seeker Entry Screen
Veteran and Migrant Worker Entry***

Step-by-Step:

- 1) Enter “Y” in the Veteran fields that apply. For veterans with active service history, list the dates of service.
- 2) There are 3 types of Migrant Workers. Enter the correct type when applicable.
- 3) Click on “**Save**” button.

The Desired Employment screen is used to enter O*NET titles related to work experience and desired employment. Registers are used to link seeker to employers.

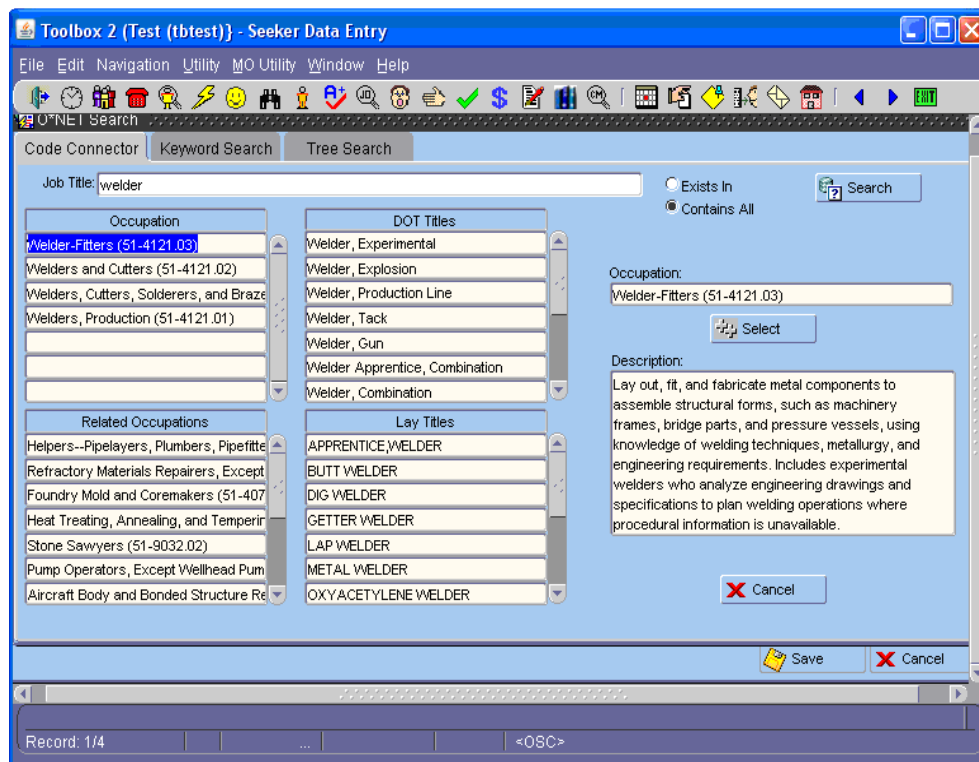
Figure 4: Seeker Entry Desired Employment Screen

Step-by-Step:

- 1) Enter the seeker **“Objective Statement”**.
- 2) Enter **“O*NET Titles”** the job seeker would like to include. Include months of experience if applicable.
- 3) Enter any **“Registers”** that the seeker desires.
- 4) Click on **“Save”** button.

A major component of completing the desired employment is selecting occupation (O*NET) Job Titles. The O*NET Search pop-up includes:

- 1) Three different screens to help you select an O*NET. The **“Code Connector”**, **“Key Word”** Search and **“Tree”** Search.
- 2) Code Connector allows the staff to enter a job title and see Occupations, Related Occupation, DOT Titles and Lay Titles.
- 3) Keyword search allows the staff to enter key words to help find the O*NET title.
- 4) Tree search allows staff to look for O*NET’s within the O*NET families using a tree.



*Figure5: O*NET Search Pop-up Screen*

Step-by-Step:

- 1) Press the “Select” button when the correct occupation has been chosen.
- 2) Click the “Save” button.
- 3) **If the youth does not have a summer assignment at the time of enrollment, enter a job that matches their field of interest to establish the O*NET code and employment information. When the assignment is made, return to the employment plan and update with the correct job information.**

The **Job Information** screen is used to set the seeker desired work requirements.

Toolbox 2 (Test (tbtest)) - Seeker Data Entry

File Edit Navigation Utility MO Utility Window Help

Basic VetMig Desired Emp Job Info Emp His Education Eligibility Skills

Per: F Minimum Salary: 7.00

Commission: N

Available to Work: P

Shifts: E

Work Saturday: N Sunday: N

Live At Worksite: N

Domestic Jobs: N

Lifting: 2

Access to Car: N

Will Relocate: N

Has Drivers License: Y

Commercial Class: A

Endorsements:

Save Cancel

Figure 6: Seeker Entry Job Information Screen

Step-by-Step:

- 1) Enter the **Minimum Salary**. DWD recommends **NGJT participants** who are going to receive minimum wage be paid the higher minimum wage of \$7.25 per hour at the beginning of the program.
- 2) Since all participants will be paid by the hour, enter a “**N**” for Commission in the Available to Work blank, enter a “**F**” for full time, “**P**” for part time, “**T**” for temporary, “**S**” for seasonal, “**R**” for PRN.
- 3) In the Shifts, enter an “**E**” for evening, “**D**” for Day, “**N**” for Night, “**R**” for Rotating, or “**S**” for Split shifts.
- 4) Enter a “**N**” or “**Y**” for Domestic Jobs
- 5) Enter a “**N**” or “**Y**” if the seeker has a Drivers License
- 6) Click on “**Save**” button

The **Employment History** screen is where the job seeker's past jobs are entered.

Seeker Data Entry

Basic Vet/Mig Desired Emp Job Info Emp His Education Eligibility Skills

◆ Employer Name: McDonalds
City: Jefferson City State: MO
Start Date: 06/07 End Date: Months: Print on
Hours Per Week: 20 Per: H Ending Salary: 7.00 Res: Y
◆ Job Title: Fry Cook
◆ Job Description/Duties/Tools: Deep fryer and fry grill, cash register. Prepare enough fries so the customer does not have to wait for them. Help co-workers prepare food for customers and always with a smile.

◆ Employer Name:
City: State:
Start Date: End Date: Months: Print on
Hours Per Week: Per: Ending Salary: Res:
◆ Job Title:

◆ Employer Name:
City: State:
Start Date: End Date: Months: Print on
Hours Per Week: Per: Ending Salary: Res:
◆ Job Title:

— Delete

Save Cancel

Enter the job description, duties and tools used (FF)
Record: 1/1 <OSC>

Figure 7: Seeker Entry Employment History Screen

Step-by-Step:

- 1) Enter the seeker employment information for every job they have had in the past.
- 2) Enter “**Employment Name**”, “**City**” and “**State**”.
- 3) Enter the employment “**Start**” and “**End Dates**”, “**Months Worked**”, “**Hours Worked Per Week**” and the “**Ending Salary**”.
- 4) Select “**Y**” in the “**Res**” field if the seeker wants the job to display on their resume.
- 5) Enter the “**Job Title**” and a “**Description**” of the job duties the seeker performed while at that job.
- 6) Click “**Save**” button.

The **Education** tab is used to enter Schooling/Education History, Licenses & Certificates, Accomplishments and Other Education Information.

The screenshot shows the 'Seeker Data Entry' application with the 'Education' tab selected. The interface includes several sections for data entry:

- Top Section:** Contains 'In School' (Y) and 'Years of School' (11).
- Education Records:** Two rows for entering school information. Each row includes fields for Degree (N), School Name (Jefferson City High School), City (Jefferson City), State (MO), Country, Major Code, Minor Code, and Date Completed. A 'Delete' button is present for each record.
- Certificates/Licenses:** A table with columns for C or L, Code, Description, State, and Date. A 'Delete' button is located below the table.
- Accomplishments:** A section for entering accomplishments, indicated by callout 5.
- Other Education:** Two rows for entering other education, including School Name, Type of Education, State, and Date Received. A 'Delete' button is present for each record.
- Bottom Section:** Contains 'Save' and 'Cancel' buttons, indicated by callout 7.

Numbered callouts point to specific fields or sections:

- 1: In School (Y)
- 2: Degree (N)
- 3 and 4: Certificates/Licenses table
- 5: Accomplishments section
- 6: School Name field in the Other Education section
- 7: Save button

Figure 8: Seeker Entry Education Screen

Step-by-Step:

- 1) Specify if the seeker is still in school and how many years of schooling they have completed. ("Y" for yes; "N" for no)
- 2) For each educational record list enter the "**Degree Type**", "**School Name**", "**Address**", as well as the "**Major/Minor**" and the "**Completion Date**".
- 3) Enter any certificates or licenses ("L" for license; "C" for certificate).
- 4) Double click to choose the license of certification from the **List of Values (LOV)** to insure that the record is searchable for a match.
- 5) Enter any seeker "**Accomplishments**". (Accomplishments)
- 6) Enter any other education received in the section at the bottom of the screen.
- 7) Click on "**Save**" button.

The **Eligibility** tab is used to enter information that may create WIA barriers to employment

Seeker Data Entry

Basic Vet/Mig Desired Emp Job Info Emp His Education Eligibility Skills

1 Disabled: N

2 Employment Barrier: N

Large Layoff: N

Out of Workforce: N

Lost Assistance: N

3 Lack Marketable Work Skills: Y

4 LEP:

5 Additional Comments: Kyle is interested in welding and needs training in that field.

6 Save Cancel

Seeker's additional comments (FF)

Record: 1/1

Figure 9: Seeker Entry Eligibility Screens

Step-by-Step:

- 1) Enter a “Y” if the seeker is disabled and their disability is a barrier to employment.
- 2) Enter “Y” if the seeker has been involved in a “**Large Layoff**”, been “**Out of the Workforce**” more than 8 years, or “**Lost Assistance**”.
- 3) Enter “Y” if the seeker “**Lack Marketable Work Skills**”.
- 4) If the seeker has “**Limited English Speaking**” skills, enter their primary language.
- 5) “**Additional Comments**” related to employment can be added.
- 6) Click on the “**Save**” button.

The **Skills** tab is used to enter skills that the job seeker possesses.

Seeker Data Entry

Basic Vet/Mig Desired Emp Job Info Emp His Education Eligibility Skills

Skill Code	Skill Description
MIG	MIG Welding

Delete

Save Cancel

Code for seeker's skills or tools owned (LOV)
Record: 1/1 ... List of Valu... <OSC>

Figure 10: Seeker Entry Skills Screens

Step-by-Step:

- 1) If the seeker has completed an employment registration form and entered skill codes, use those forms to enter the skills the job seeker possess.
- 2) Double click in the “**Skill Code**” column to find the “**List of Skills**”.
- 3) Double click on the skills category; select the skills that apply to the job seeker.
- 4) Click the “**Save**” button.

Updating the Job Seeker's Record

Seeker Screen - KYLE W | No Primary Counselor Assigned

Find Seeker | Seeker Info | Des Job Title | Edu/Cert | Work History | Referrals | **Other** | Scratch Pad | Svc Referral | Adv. Query

2 → Other Seeker Info

Seasonal Farm Worker: Migrant Worker: Currently Employed:

Citizen: Alien Reg Number:

Refugee: Date of Entry:

Asylee: Date Asylum Granted:

3 → Race

☐ American Indian or Alaska Native ☐ Asian ☐ Black or African American

☐ Native Hawaiian or other Pacific Islander ☒ White ☐ Not Declared

Ethnicity

☐ Latino/Hispanic ☒ Non Latino/Hispanic ☐ Undeclared

General Information

Active: **1**

Inactive:

Entered: By:

Additional Comments:

Kyle is interested in welding and needs training in that field.

Objective Statement:

Kyle is interested in becoming a welder, needs more training **4**

5 → Accomplishments

Counts

DWD Referrals: Placements:

Self Referrals: Services:

Employer Referrals: Scratch Pads:

6 → Save

Cancel

Description of accomplishments for electronic resume (FF)

Record: 1/1

<OSC>

Figure 11: Seeker Other Screen

Step-by-Step:

- 1) To update a job seeker's record, click on the **"Other"** tab on **"Seeker Screen"**
- 2) Complete the **"Other Info"** section of the **"Other"** screen.
- 3) Select the job seeker's **"Race"** and **"Ethnicity"**
- 4) Complete the **"Objective Statement"**. This will transfer to the electronic resume.
- 5) Enter additional accomplishments in the **"Accomplishments"** chart, by clicking on the box.
- 6) Click on the **"Save"** button.

Initial Interview

The purpose of the Initial Interview is to provide a brief informal assessment of the job seeker's immediate needs.

Initial Interview for KYLE W. LINDA LOESCH (573)751-2240

Initial Interview Resource/Activities

Interview Dates

03/12/08

Interv SCH

+ Add

Copy

Presenting Situation:

Kyle is a high school senior, still in school and works part-time at McDonalds. After he graduates in May his parents are relocating to another state. Kyle wants to stay in Missouri and attend a technical school to learn to be a welder. At this time he does not have any transportation of his own. He has been using his mom's car to go to work. He does have his drivers license.

Resource/Activities

- ☐ Child Care
- ☐ Eligibility Verifications
- ☐ Registration For Services (Form 61)
- ☐ Health Assessment - (Form 1, SSI)
- ☒ Housing
- ☐ Mental Health
- ☐ ORS/Legal
- ☐ Other
- ☐ Job Connection/Resume
- ☐ Supportive Services
- ☒ Transportation
- ☐ Veteran
- ☐ Voc. Assessment/Rehab
- ☐ Workshops
- ☒ Youth


Save Cancel

Records the date you complete the initial interview

Record: 1/1

Figure 12: Initial Interview Screen

Step-by-Step:

- 1) Click on Initial Interview  icon
- 2) The “Interview Dates” section allows the staff to create additional Initial Interview records. Click on the “Add” button to create new records. If the case manager wants to create a new record using the data from an existing record, click on the “Copy” button. The information can be modified during the day it was entered.
- 3) Summarize the job seeker’s current situation, their family or household by clicking on the “Presenting Situation” section. Address items like marital status, members of the household living in the home, and whether the job seeker has dependent children. The job seeker’s education, employment and skills also need to be addressed in this section.
- 4) Check the boxes in the “Resources/Activities” section that have been determined as issues for the job seeker at this point in time.
- 5) Click the **“Save”** button.

The purpose of the **Initial Interview-Resource/Activities tab screen** is to enter a brief description of possible resources and how the job seeker can access those resources. Only the boxes that were checked on the Initial Interview screen will be available to enter information, all other boxes will be protected.

The screenshot shows the 'Initial Interview-Resource/Activities' screen in the 'Toolbox 2 (Test (tbtest))' application. The window title is 'Toolbox 2 (Test (tbtest)) - Initial Interview'. The menu bar includes 'File', 'Edit', 'Navigation', 'Options', 'Utility', 'MO Utility', 'Window', and 'Help'. The toolbar contains various icons. The main area is divided into two tabs: 'Initial Interview' and 'Resource/Activities'. The 'Resource/Activities' tab is active, showing a grid of text boxes for entering information about various resources. The grid includes fields for 'Interviewer' (LINDA LOESCH), 'Child Care', 'Mental Health', 'Transportation', 'Eligibility Verifications', 'ORS/Legal', 'Veteran', 'Registration For Services (Form 61)', 'Other', 'Voc. Assessment/Rehab', 'Health Assessment', 'Job Connection/Resume', 'Workshops', 'Housing', 'Supportive Services', and 'Youth'. Red boxes with numbers 1 through 4 point to specific elements: 1 points to the 'Interviewer' field, 2 points to the 'Appt' button, 3 points to the 'Task' button, and 4 points to the 'Save' button. The bottom status bar shows 'Record: 1/1' and '<OSC>'.

**Figure 13: Initial Interview
Resources/Activities Screen**

Step-by-Step:

- 1) Enter brief details in every box that were determined on the Initial Interview screen as issues for the job seeker. The information entered should provide the job seeker with enough details about the resource or referrals to enable them to access the services available to them.
- 2) Click on the “Appointment” button to create an appointment for the job seeker to meet with another staff.
- 3) Click on the “Task” button to set a task for the job seeker.
- 4) Click the **“Save”** button.

Assessment

In order to access the Assessment Screen you will need to first go to the Seeker Information Screen to enroll the job seeker into Case Management.

ToolBox2(Training Database(Tbtrn)) - Seeker

File Edit Navigation Options Utility MO Utility Window Help

Find Seeker Seeker Info Des Job Title Edu/Cert Work History Referrals Other Scratch Pad Svc Referral Adv. Query

Name and Address Information

DVD TRAINERS Mailing Address: 1234 TRAINING LANDING Street Address:

Phone Numbers Home: (573)555-9632 Cell: JEFFERSON CITY MC 65101 Email: kim.nichols@ded.mo.gov

Personal Information

Date of Birth: 01/01/1972 In School Disabled Age: 36 Searchable Work Disabled Gender: F Share resume Displ. Homemaker Citizen: Y Undoc Alien Deceased

Alien Reg # A LEP:

Veteran Information

Vet Status: N - None Transition: Served From Served To

Recently Separated Served in Campaign Print on Summary (Resume) Service Ended by Disability Spouse Currently Deployed in Reserves or National Guard Branch: Status Verified

Source: KIM NICHOLS Partial Seeker Restricted Secondary Counselor

Seeker Status

Status Date Last Update Emp Exchange: Active 03/18/08 03/18/08 Case Management: Active Next Appt: Time: UI Ben Year End Dt: Inactive Next Task:

App ID: 2306386299 Possible/Actual Enrollments

Services Provided

Date	Type of Service	Employment Counselor
03/18/08	Career Guidance	KIM NICHOLS



Save Cancel

Indicates date seeker's Case Management status was last updated by an Employment Counselor.

Record: 1/1 <OSC>

Figure 14: Seeker Screen

Step-by-Step:

- 1) Click on the Seeker icon .
- 2) Click on the "Options" tab on the tool bar, then scroll down to "Activate/Inactivate Case Management" and click on it to activate Case Management.
- 3) Click on the Assessment icon .

The Assessment Employment Tab is used to enter information about the job seekers work potential and barriers.

Toolbox 2 (Test (tbtest)) - Assessment

File Edit Navigation Options Utility MO Utility Window Help

Assessment - KYLE WML | LINDA LOESCH (573)751-2240

Employment Education Support System Financial Needs Legal Screening Health/Treatment Basic Skills Tests

Assessment Date: 03/13/08 Last Update Date:

Employment History

Employer	City	St
McDonalds	Jefferson City	MO

+ Add - Delete

Job Title: Fry Cook

Start Date: 06/07 End Date: Months:

Per: Hourly Salary: 7.00 Hrs. Wk.: 20

Job Description: Deep fryer and fry grill, cash customer does not have to w em. Help co-workers prepare food

Reason For Leaving:

Job Seeking Skills

Do you have a resume? No

Which methods worked best for you?

Describe your typical interview

Do you need help preparing for interviews?

Job Keeping Skills

Were you able to get to work on time? Yes

Did you work most scheduled work hours? Yes

Describe your working relationship with your co-workers/supervisor

What type of jobs have you liked in the past and what are you interested in?

Describe what you liked most about your last job

Describe what you liked least about your last job

LMI vs. Potential Earnings: LMI

Legal

Offender Status:

Bonding Appropriate?

Save Cancel

Select Yes or No

*Figure 15: Assessment
Employment Tab Screen*

Employment History Section

The “Employment History” section of the screen includes the job seeker’s “Employment History” that was entered on the “Seeker Employment History” screen. These records will display on the “Seeker” screen.

If youth has never held a job skip the Employment History boxes.

Step-by-Step:

- 1) To add new records, click on the “Employer” text box; enter the employer name, city and state.
- 2) Click on the “Job Title” text box, enter the job title.
- 3) Enter the “Start Date”, “End Date” and “Months” of experience.
- 4) Select the correct wage value from the drop down list. Enter a wage in the “Salary” text box and enter the number of “Hours Week”.
- 5) Enter a “Job Description” for the job that is being entered in the text box.
- 6) Select the correct value from the drop down list for the “Reason for Leaving”.

Toolbox 2 (Test (tbtest)) - Assessment

File Edit Navigation Options Utility MO Utility Window Help

Assessment - KYLE W | LINDA LOESCH (573)751-2240

Employment Education Support System Financial Needs Legal Screening Health/Treatment Basic Skills Tests

Assessment Date: 03/13/08 Last Update Date:

Employment History

Employer	City	St
McDonalds	Jefferson City	MO

+ Add
- Delete

Job Title: Fry Cook

Start Date: 06/07 End Date: Months:

Per: Hourly Salary: 7.00 Hrs. Wk.: 20

Job Description: Type: Verified

Deep fryer and fry grill, cash register. Prepare enough fries so the customer does not have to wait for them. Help co-workers prepare food

Reason For Leaving: Verified Termination

Job Seeking Skills

Do you have a resume? No

Which methods worked best for you?

Describe your typical interview

Do you need help preparing for interviews?

Job Keeping Skills

Were you able to get to work on time? Yes

Did you work most scheduled work hours? Yes

Describe your working relationship with your co-workers/supervisor

What type of jobs have you liked in the past and what are you interested in?

Describe what you liked most about your last job

Describe what you liked least about your last job

LMI vs. Potential Earnings: LMI

Legal

Offender Status:

Bonding Appropriate?

Save Cancel

Select Yes or No

**Figure 16: Assessment
Employment Tab Screen**

Job Seeking Skills Section

The “Job Seeking Skills” section of the screen allows the staff to enter job search skills that the seeker has.

Step-by-Step:

- 7) In the “Job Seeking Skills” section of this screen, answer the following questions by entering the information in the text boxes. The questions to be answered are: “Do you have a resume”, “Which methods worked best for you?”, “Describe your typical interview” and “Do you need help preparing for interviews?” If the Employment History was skipped, skip the questions “which methods worked best for you?” and “Describe your typical interview”; answer the rest.

Employment Tab Screen

Toolbox 2 (Test (tbtest)) - Assessment

File Edit Navigation Options Utility MO Utility Window Help

Assessment - KYLE W M | LINDA LOESCH (573)751-2240

Employment Education Support System Financial Needs Legal Screening Health/Treatment Basic Skills Tests

Assessment Date: 03/13/08 Last Update Date:

Employment History

Employer	City	St
McDonalds	Jefferson City	MO

+ Add - Delete

Job Title: Fry Cook

Start Date: 06/07 End Date: Months:

Per: Hourly Salary: 7.00 Hrs. Wk.: 20

Type: Verified

Job Description:

Deep fryer and fry grill, cash register. Prepare enough fries so the customer does not have to wait for them. Help co-workers prepare food

Reason For Leaving: Verified Termination

Job Seeking Skills

Do you have a resume? No

Which methods worked best for you?

Describe your typical interview

Do you need help preparing for interviews?

Job Keeping Skills

Were you able to get to work on time? Yes

Did you work most scheduled work hours? Yes

Describe your working relationship with your co-workers/supervisor

What type of jobs have you liked in the past and what are you interested in?

Describe what you liked most about your last job

Describe what you liked least about your last job

LMI vs. Potential Earnings: LMI

Legal

Offender Status:

Bonding Appropriate?

Save Cancel

9

8

A

**Figure 17: Assessment
Employment Tab Screen**

Job Keeping Skills Section

The “Job Keeping Skills” section of the screen identifies skills that the jobseeker has for maintaining their employment. This section also includes an “LMI” button (“A”, above). The LMI button can be used to access State Labor Market Information.

Step-by-Step:

- 8) In the “Job Keeping Skills” section of this screen, answer the following questions by entering the information in the text boxes. The questions to be answered are: “Were you able to get to work on time?”, “Did you work most scheduled work hours?”, “What type of jobs have you liked in the past and what are you interested in?”, “Describe what you like most about your last job?”, “Describe what you like least about your last job?”, “LMI vs. Potential Earnings”, “Offender Status” and “Bonding Appropriate?”. Answer those most relevant to each individual youth.
- 9) Click on “**Save**” button.

The Assessment Education is used to enter information about the job seeker's educational background. Information entered on this screen will help the staff understand the job seeker's educational strengths and weaknesses.

**Figure 18: Assessment
Education Tab Screen**

Education History Section

The “Education History” section of the screen lists the job seeker’s education history. This information pre-populates from the Seeker screen. New records can be added here and will display on the Seeker screen.

Step-by-Step:

- 1) Select the “Highest grade completed” from the dropdown box.
- 2) Select “Yes” or “No” if “Currently in School”.
- 3) Select “Yes” or “No” for “Would you like to obtain your high school diploma or GED?”
- 4) Select “Yes” or “No” for “Do you have a learning disability”. If the participant has a learning disability, double click on the text box to describe the participant’s disability.
- 5) In the text box, describe what the participant “Liked about school”.
- 6) In the text box, describe what the participant “Disliked about school”.
- 7) Select “Yes” or “No” if the participant did not complete.
- 8) In the text boxes, list the “Training Program” they did not complete, the “Reasons for Leaving”, and the “Exit Date”.
- 9) Select “Yes” or “No” if the participant is “Interested in more training or skill enhancement”. In the next text box, describe what type of training they are interested in.

- 10) Additional education information may be added; to add, click on “Add” button. Enter “School” name in the new text box. Enter the “City”, “State”, and “Major”. Select the type of “Degree” from the dropdown box. Enter the “Completion Date”.
- 11) Double click in the “Employment Skills” text box to receive the List of Values to select the participant’s employment skills.
- 12) Double click in the “Aptitude/Ability Tests” text box to receive the List of Values to select the “Test Type” to enter the type of test the participant took.
- 13) Enter the “Test Date” in the text box.
- 14) Enter the participant’s scores in the “Results” text box.
- 15) If additional tests need to be entered, click on the “Add” button.

Assessment-Education Tab Screen

The screenshot shows the 'Assessment - KYLE W | LINDA LO' window with the 'Education' tab selected. The interface includes various input fields and sections for educational data. Two red callout boxes with arrows point to specific fields: callout 16 points to the 'LEP/ESL' text box in the 'Education Issues' section, and callout 17 points to the 'Pell grant status' dropdown menu in the same section. Other visible sections include 'Employment Skills', 'Aptitude/Ability Tests', 'Training Completion Certificates', and 'Licenses and Certificates'. The bottom of the window has 'Save' and 'Cancel' buttons.

**Figure 19: Assessment
Education Tab Screen**

Education Issues Section

The “Education Issues” section of the screen allows the staff to enter possible education issues the job seeker may have. The Financial Aid button provides access to the Free Application for Federal Student Aid (FAFSA) web site.

Step-by-Step:

- 16) If the participant has a limited English proficiency, indicate the primary language by double clicking in the “LEP/ESL” text box to receive the List of Values. Describe in the text box, any barriers the participant has because of their LEP/ESL.
- 17) Select the participant’s “Pell grant status” from the dropdown box. Enter the “Year” and “Amount” in the text boxes.

**Figure 20: Assessment
Education Tab Screen**

Licenses and Certificates Section

The “Licenses and Certificates” section of the screen lists “Certificates of Training and Licenses/Certificates” the job seeker may have. New records can be added here and will display on the Seeker screen. The “Additional” button is a pop-up that displays Additional Education records for education not related to a specific degree.

Step-by-Step:

- 18) To add additional “Training Completion Certificates”, enter the description of the Training Certificate” in the text box.
- 19) To enter additional “Licenses and Certificates”, select the type of License and/or certificate from the dropdown box. Enter the description of the License and/or Certificate in the text box. Enter the completion “Date” in the next text box. Double click in the “State” text box to receive the List of Values to enter the State abbreviation where the License and/or Certificate were received.
- 20) Click on “**Save**” button.

The Assessment Support System tab screen is used to enter information about the job seeker's family. Information entered on this screen will help the staff understand the job seeker's family situation including potential for support and any dangers that may be family related.

The screenshot shows the 'Assessment Support System' tab in a software application. The interface includes a top navigation bar with tabs: Employment, Education, Support System (selected), Financial Needs, Legal, Screening, Health/Treatment, and Basic Skills Tests. The main content area is divided into several sections:

- Childcare Section:** Includes fields for 'Assessment Date' (03/13/08), 'Last Update Date', 'Seeker Pregnant' (checkbox), 'Due Date', 'Household include children' (checkbox), 'Need child care supportive services to participate in employment/Training activity' (checkbox), 'Describe:' (text area), 'Applied for Childcare?' (checkbox), 'Childcare provider?' (text), 'What is your backup plan if provider is not available?' (text), 'Additional Support' (checkbox), and 'Any additional supports you need to be successful in employment/participation?' (text).
- Transportation Section:** Includes 'What is your transportation?' (text), 'What is your backup plan if primary transport is unavailable?' (text), 'Drivers License' (checkbox), 'State:' (dropdown), 'Class: B - Class CDL' (dropdown), 'Status:' (text), and 'Endorsements:' (text).
- Additional Support Contacts Table:** A table with columns: Name, Number, Relationship, Type. It includes 'Add' and 'Delete' buttons.
- Housing Section:** Includes 'Homeless in the last year:' (dropdown), 'Describe:' (text area), 'Current Situation:' (dropdown), 'Expect any changes in 90 days:' (dropdown), and 'Describe:' (text area).
- Household Members Table:** A table with columns: First, Mi., Last, Birthday, Age, Gender, Relation, Dep. It includes 'Add' and 'Delete' buttons.
- Buttons:** 'Print', '+ Add', '- Delete', 'Save', and 'Cancel'.

Numbered callouts (1-10) point to specific fields or sections:

- 1: Points to the 'Childcare' section header.
- 2: Points to the 'Housing' section header.
- 3: Points to 'What is your transportation?'.
- 4: Points to 'Child Care Start Date'.
- 5: Points to 'State:' dropdown.
- 6: Points to 'Childcare provider?'.
- 7: Points to 'Status:' dropdown.
- 8: Points to the 'Additional Support Contacts' table.
- 9: Points to the 'Household Members' table.
- 10: Points to the 'Save' button.

Figure 21: Assessment Support System Tab Screen

Step-by-Step:

- 1) The **Child Care** and **Additional Support** section of the screen can be used to assess any childcare or other needs the job seeker has. Complete the following fields:
 - Seeker Pregnant
 - Due Date
 - Household include children
 - Need child care supportive services to participate
 - Describe need
 - Applied for Childcare?
 - Childcare Provider
 - What is your backup plan if provider is not available?
 - Any additional supports you need to be successful in employment/participation?
- 2) The **Housing** section of the screen provides current and past housing information. Complete the following fields:
 - Homeless in the last year? Describe situation
 - Current situation
 - Expect any changes in 90 days, describe.

- 3) The **Transportation** section of the screen allows the staff to enter transportation problems and solutions. Complete the following questions.
 - What is your transportation?
 - What is your backup plan if primary transportation is unavailable?
- 4) Enter the “State” the participant was issued a Drivers License.
- 5) Select the “Class” of Driver License from the dropdown box.
- 6) Enter any “Endorsements” that the participant has by double clicking on the text box to get a List of Values to choose from.
- 7) In the “Status” text box, describe the current status of the participant’s driver’s license and vehicle insurance.
- 8) The **Support Contacts** section of the screen can be used to identify individuals that may be able to help support the family.
- 9) The **Household Members** section of the screen can be used to enter information about the family members living in the household.
- 10) Click the **“Save”** button.

The **Assessment Financial Needs tab screen** is used to determine the job seeker's income and expenses.

The screenshot shows the 'Assessment - KYLE W MI' window with the 'Financial Needs' tab selected. The interface includes a top navigation bar with tabs: Employment, Education, Support System, Financial Needs, Legal, Screening, Health/Treatment, and Basic Skills Tests. The main area contains the following elements:

- 1**: Assessment Date: 03/13/08, Last Update Date: (empty)
- 2**: Assessment Month & Year (dropdown menu)
- 3**: Comment text box
- 4**: Copy button
- 5**: Add button
- 6**: Delete button
- 7**: Assessment Month Net Difference (Total Resources minus Expenditures): 0
- Monthly Household Resources** table with columns: Resource Type, Description, Amount
- Monthly Household Expenditure** table with columns: Expenditure Type, Description, Amount
- 8**: Total Monthly Resources (text box)
- 9**: Total Monthly Expenditures (text box)
- 10**: Financial Education checkbox
- 11**: Print button
- 12**: Save button
- 13**: Cancel button

Figure 22: Assessment Financial Needs Tab Screen

Step-by-Step:

- 1) The **Assessment Month & Year** section of the screen can be used to enter the budget month and year. Click on the text box to enter the MM/YYYY.
- 2) Comments on the participant's financial situation can be added in the "Comment" text box.
- 3) The **Copy** button allows the staff to copy another month's budget information into the current month. After the information is copied it can be modified before it is saved. The **Add** and **Delete** buttons allow the staff to add new budget months or delete.
- 4) The **Monthly Household Resources** section of the screen is used to enter the resources the household has for a given month.
 - Identify the financial "Resource type" by double clicking on the text box to receive the List of Values.
 - Describe the resource type of earned income or alternative money in the "Description" text box.
 - In the "Amount" text box, enter the anticipated monthly amount of the resource.
- 5) The **Monthly Household Expenditure** section of the screen is used to enter the expenses the household has for a given month.
 - Identify the "Expenditure type" by double clicking on the text box to receive the List of Values.
 - Describe the type of expenditures in the "Description" text box.
 - In the "Amount" text box, enter the monthly amount of the expense.

- 6) In the “Assessment Month Net Difference” text box, the gross resource dollar amount minus expenditures will appear after the resources and expenditures are added.
- 7) Click on the **“Save”** button

The **Assessment Screening tab screen** is used to determine if the job seeker has problems related to Substance Abuse or Domestic Violence. Unlike the rest of the Assessment screens, ask these questions exactly as they are written.

The screenshot shows a web application window titled "Assessment - KYLE W" with a user ID "LINDA LOESCH (573)751-2240". The interface has several tabs: Employment, Education, Support System, Financial Needs, Legal, Screening (selected), Health/Treatment, and Basic Skills Tests. The "Screening" tab contains two main sections: "Substance Abuse Questions" and "Domestic Violence Questions".

Callout 1 points to the "Substance Abuse Questions" section, which includes four questions with dropdown menus for answers:

- In the past year have you felt you should Cut down on drinking or drug use?
- In the past year have people Annoyed you by criticizing your drinking or drug use?
- In the past year have you felt bad or Guilty about your drinking or drug use?
- In the past year have you had a drink or drugs first thing in the morning (Eye opener) to steady nerves, rid a hangover, or get the day started?

Callout 2 points to the "Domestic Violence Questions" section, which includes four questions with dropdown menus for answers:

- In the past year have you felt Threatened or afraid of a partner in any way?
- In the past year have you been Annoyed by friends or family for criticizing about how your partner treated you?
- In the past year have you Lost a friend or stopped associating with someone because of your partner?
- In the past year have you been physically or Emotionally injured by a partner?

Callout 3 points to the "Referred to Social Worker:" dropdown menu and the "Date referred:" text box, both of which are part of the referral information section. Below these is a "Referral Form" button.

Callout 4 points to the "Save" button at the bottom right of the screen.

At the bottom of the window, there is a footer note: "Ask question as written, indicate 'Yes' or 'No' (LOV)".

Figure 23: Assessment Screening Tab Screen

Step-by-Step:

- 1) The **Substance Abuse** section of the screen is used to ask the job seeker question about substance abuse. Complete the following fields:
 - In the past year have you felt you should cut down on drinking or drug use?
 - In the past year have people annoyed you by criticizing your drinking or drug use?
 - In the past year have you felt bad or guilty about your drinking or drug use?
 - In the past year have you had a drink or drugs first thing in the morning (eye opener) to steady nerves, rid a hangover, or get the day started?
- 2) The **Domestic Violence** section of the screen is used to ask the job seeker question about domestic violence. Complete the following fields:
 - In the past year have you felt Threatened or afraid of a partner in any way?
 - In the past year have you been annoyed by friends or family for criticizing about how your partner treated you?
 - In the past year have you lost a friend or stopped associating with someone because of your partner?
 - In the past year have you been physically or emotionally injured by a partner?
- 3) Select where the referral was made from the dropdown box. Enter today's date in the **Date-Referred** box and use the **Referral Form** button to create a referral and give to the job seeker.
- 4) Click on the **"Save"** button

The **Assessment Health/Treatment tab screen** is used to enter information about the job seeker's health.

The screenshot shows a software interface for an assessment. At the top, there are tabs for Employment, Education, Support System, Financial Needs, Legal, Screening, Health/Treatment (selected), and Basic Skills Tests. The header includes the name 'LINDA LOESCH (573)751-2240' and the assessment date '03/13/08'. The 'Health' section contains several questions with dropdown menus and text input fields. A red box labeled '1' points to the 'Health' section header. A red box labeled '2' points to the 'Insurance' dropdown menu. A red box labeled '3' points to the 'Type' dropdown menu in the 'Treatments' section. A red box labeled '4' points to the 'Save' button at the bottom right of the form.

Figure 24: Assessment Health/Treatment Tab Screen

Step-by-Step:

- 1) The **Health** section of the screen can be used to enter Health concerns about the job seeker. Complete the following fields:
 - Are you the primary caregiver for a disabled family member?
 - How does it affect your ability to gain or maintain employment?
 - Explain why your health conditions keep you from participating/working.
 - Have you applied for social security disability benefits? Date applied.
 - What is the status of your application?
 - Are you working with an advocate and/or lawyer? Name. Contact Number.
 - What work activities are appropriate based on your circumstances?
 - What type of work environment is best suited to your abilities?
- 2) The **Insurance** section of the screen is used to enter job seeker Insurance information. Choose “Yes” or “No” to indicate status of the participant’s “Insurance”. From the dropdown box, select the “Insurance type” the participant has.
- 3) Use the **Treatments** section of the screen to enter any information about Treatments the job seeker may be receiving. Complete the following fields:
 - Double click or F2 in the “Type” field to select type of treatment the job seeker is receiving. Use the “Add” button if you need to enter multiple treatment records.
 - Medical Verification, Date, End Date, and Follow up
 - Start date, end date, Information release, and Expiration date.

- Describe the treatment activity that is recommended by the physician in the “Treatment description”.
- Treatment facility
- Physician name, Phone, Ext. and Fax
- Therapists name, Phone, Ext. and Fax.

4) Click on the **“Save”** button

The Basic Skills Tests tab screen gives detailed information about Math, Reading and Writing tests taken / entered into the Toolbox 2 system.

The screenshot shows the 'Basic Skills Tests' tab in the Assessment system. The window title is 'Assessment - KYLE W | LINDA LOESCH (573)751-2240'. The tabs are: Employment, Education, Support System, Financial Needs, Legal, Screening, Health/Treatment, and Basic Skills Tests. The 'Basic Skills Tests' tab is active, showing three sections: Math, Reading, and Limited English Proficiency. Each section has a table with columns for Type, Test Date, Test Name, Case Manager, Location, Level, Score, and Grade Equiv. Red arrows point from a box labeled '1' to the first row of the Math table. Another red arrow points from a box labeled '4' to the 'Save' button at the bottom right.

*Figure 25: Assessment
Basic Skills Tests Tab Screen*

Step-by-Step:

- 1) Youth Scores allow the staff to see how the Youth job seeker is progressing in their **Math, Reading and Writing/Language** proficiency. Complete the following fields in the test (Math, Reading, and/or LEP) you have given:
 - Type
 - Test Date
 - Test Name
 - Case Manager
 - Location
 - Level
 - Score
 - Grade Equivalent
- 2) Tests can be entered on this screen or on the **Youth Scores** tab in the Testing section of the system. Test scores can be entered on this screen or on the **Basic Skills Tests** tab in the ICON (A+Check) See **Figure 16**
- 3) If Basic Skills Deficient is chosen as a barrier, then the Basic Tests and Assessment will have to be completed. Do not confuse “Basic Skills Deficient” barrier with “Do you lack occupational goals and skills”.
- 4) Click on the **“Save”** button

Basic Skills Tests

Toolbox 2 (Training) - Testing

File Edit Navigation Options Utility MO Utility Window Help

Test - DWD TRAINER(###-##-7665) | No Primary Counselor Assigned

Workkeys/Clerical Scores Knowledge/Other Scores **Basic Skills Tests** Test Entry CRC

ABE **ESL**

Math Type	Test Date	Test Name	Case Manager	Location	Score	Level	Grade Equiv

Reading Type	Test Date	Test Name	Case Manager	Location	Score	Level	Grade Equiv

Language Type	Test Date	Test Name	Case Manager	Location	Score	Level	Grade Equiv

Add Save

Select All Deselect All Print Delete Chg Seeker

Record: 1/1 <OSC>

Figure 26: Basic Skills Testing

Eligibility

Click on Eligibility Icon  from the Seeker Info page.

The Eligibility Application tab screen is used to enter general information about a job seeker that is being considered for training services. Most of this information could be populated if the job seeker completed the application on-line.

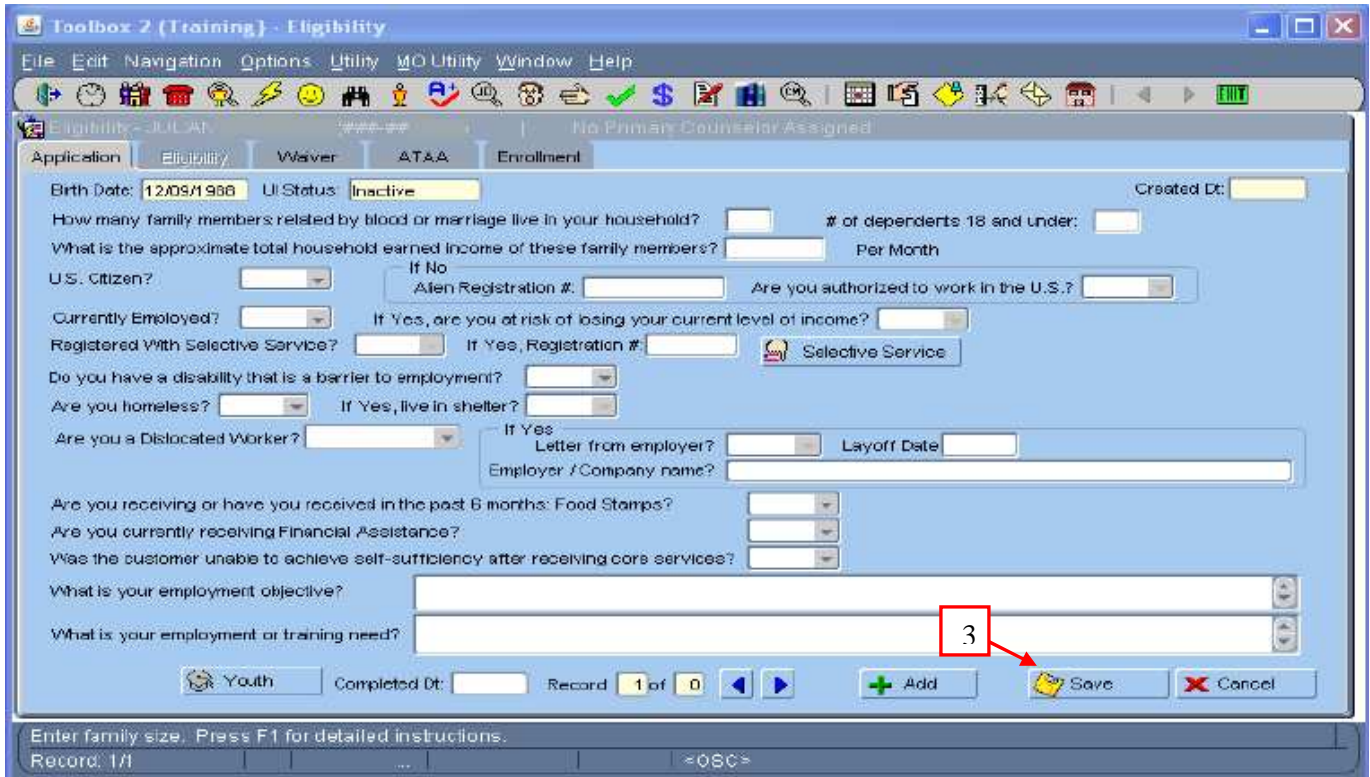


Figure 27: Eligibility Application Screen

Step-by-Step:

- 1) Complete the text boxes that have not been pre-populated.
- 2) Anything entered on this screen does not change seeker screen.
- 3) Click on the **“Save”** button

Toolbox 2 (Test (tbtest)) - Eligibility

File Edit Navigation Options Utility MO Utility Window Help

Eligibility - Application Eligibility Waiver ATAA Enrollment

Birth Date: 12/28/1992 UI Status: Created Dt: 03/27/08

How many family members related by blood or marriage live in your household? 3 # of dependents 18 and under: 1

What is the approximate total household earned income of these family members? 1000 Per Month

U.S. Citizen? Yes If No Alien Registration #: Are you authorized to work in the U.S.?

Currently Employed? Yes If Yes, are you at risk of losing your current level of income?

Registered With Selective Service? If Yes, Registration #: Selective Service

Do you have a disability that is a barrier to employment? No

Are you homeless? No If Yes, live in shelter?

Are you a Dislocated Worker? If Yes Letter from employer? Layoff Date Employer / Company name?

Are you receiving or have you received in the past 6 months: Food Stamps? Yes

Are you currently receiving Financial Assistance? No

Was the customer unable to achieve self-sufficiency after receiving core services? No

What is your employment objective? Kyle is interested in becoming a welder, needs more training

What is your employment or training need? Training to become a welder

1 Youth Completed Dt: Record 1 of 1 Add Save Cancel

Record: 1/1 <OSC>

Figure 28: Eligibility Application Screen

Step-by-Step:

- 1) **NGJT Youth** (14-24)
- 2) The Youth Application Pop-up will appear. See **Figure 19**
- 3) Youth button will not acknowledge youth aged 22-24. Barriers for this age group are chosen from the list on the eligibility tab (page 38).

The Youth questions help staff determine problem areas that the job seeker may have. The answers to these questions will populate on the Eligibility Barriers pop-up and determine if the job seeker is eligible for youth services. This list will appear when the youth button is clicked and only applies to youth 14-21 years of age.

Figure 29: Eligibility Youth Application Screen

Step-by-Step:

- 1) On the Youth Application pop-up screen complete the following fields before entering the application completion date.
 - Are you pregnant or parenting?
 - Are you a High School Graduate or Do you have a GED?
 - Are you a High School Dropout?
 - Are you a runaway?
 - Are you an offender?
 - Are you basic skills deficient?
 - Are you currently a foster child?
 - Are you a migrant youth?
 - Did you age out of foster care at age 18 or receive 1 year of TAL services after age 14?
 - Is one or both of your parents incarcerated?
 - Are you limited English proficient?
 - Do you lack occupational goals/skills?
 - Do you need assistance to complete an educational program, or to get a job?
 - Are they one or more grade levels below that appropriate for their age?
 - Do you have chronic health problems including disabilities?
- 2) Enter the “Completion Date”. This will freeze the application so no changes can be made.
- 3) Select the “Print” button to print a report of the application information.
- 4) The job seeker must sign the printed application.
- 5) Click on the “**Save**” button.

The Eligibility Tab Screen is used by the staff to determine if a job seeker meets the eligibility requirements for training programs. Some of the information on this screen is pre-populated from the seeker screens and eligibility application and does not have to be entered.

The screenshot shows the 'Eligibility' tab in a software application. The interface includes several sections for data entry and verification. Red callout boxes with numbers 1 through 5 highlight key features: 1 points to the 'VMA' program selection box, 2 points to the 'Check Verification' button, 3 points to the 'App Completed Date' field, 4 points to the 'VMA Youth' checkbox, and 5 points to the 'Save' button. The bottom of the screen displays a status bar with 'Record: 1/1' and navigation controls.

Figure 30: Eligibility Eligibility Screen

Step-by-Step:

- 1) As information is entered into the specific sections the box next to the Program will become highlighted in green. When the program box becomes highlighted the eligibility rules for this program have been met.
- 2) The program is not considered as eligible until the program box is highlighted in green and has a check in it. The “check” is populated when the case manager clicks the “Check Verification” button and checks off all the items that they have verified.

Income Eligibility Determination

- 1) If youth is income eligible, the following chart must be completed with the amount per month of the income.
- 2) Family size is extremely important to complete when determining income eligibility for low income.
- 3) When income is entered click “Save”.

Toolbox 2 (Training) - Eligibility

File Edit Navigation Options Utility MO Utility Window Help

VMA Family Income Worksheet

VMA Programs

	Month/Year	Total
Last Month:	03/2009	0
5th:	02/2009	0
4th:	01/2009	0
3rd:	12/2008	0
2nd:	11/2008	0
1st:	10/2008	0

VMA Semi-Annual: 0
VMA Annual: 0
Copy

Income type	Description	Amount

+ Add - Delete Monthly Income:

Save Close

VMA DW ☐
Category:
Layoff Date:
Mass Layoff:
NEG ☐
Employer:
Grant Number:
VMA Youth ☒
Barriers ☒ Out-of-School ☐
VMA Youth Recovery ☒

Check Verification

3 of 3 + Add Save Cancel

Double click in field or press F2 for the list of values to appear.
Record: 1/1 ... List of Valu... <OSC>

Figure 31: Eligibility
WIA Family Income Worksheet Screen

Youth Barriers

If youth is 22-24, this section listing barriers must be completed for eligibility.

The screenshot shows the 'Toolbox 2 (Training) - Eligibility' application window. The 'Youth Barriers' pop-up is active, displaying a grid of eligibility questions. Red annotations include: a box labeled '4' pointing to the 'Barriers' button in the top toolbar; a box labeled '1' pointing to the 'Grant Number' field; a box labeled '6' pointing to the 'Save' button; and a box labeled 'CVB' pointing to the 'Check Verification' button. The form includes sections for 'Youth Barriers' (e.g., Pregnant or Parenting, Foster Child, Homeless, Dropout, Runaway, Offender, Basic Skill Deficient, One or more grade levels below appropriate for age, Youth WMR Defined, 5% Other) and 'Needs Additional Assistance' (e.g., Migrant Youth, Aged out of Foster Care, Incarcerated parent, Behavior problems at School, Family literacy problems, Domestic violence, Substance abuse, Limited English proficient, Lacks occupational goals/skills, Disabled, Chronic Health Conditions). The right side of the pop-up has fields for 'VMA DWV', 'Category', 'Layoff Date', 'Mass Layoff', 'NEG', 'Employer', 'Grant Number', and checkboxes for 'VMA Youth Barriers', 'Out-of-School', and 'VMA Youth Recovery'.

*Figure 32: Eligibility
Youth Barriers Pop-up Screen*

Step-by-Step:

- 1) Select the “Barriers” button on the “Eligibility” screen.
Barriers are important because they are part of the requirement to determine the youth eligibility. Be careful to mark all appropriate barriers and calculate the income correctly to get the correct determination for eligibility. If not calculated correctly and barriers marked, the 5% eligibility window may be triggered.
- 2) The “Youth Barriers” pop-up screen opens. This screen must be completed before the job seeker is eligible for Youth program services. This pop-up will not be available if the job seeker is not a Youth.(Youths 22-24 will complete a barrier list on the eligibility screen)
The answers on this pop-up are pre-populated from the Youth Application. If changes to the barriers need to be made the staff can make the changes on this screen.
- 3) The left column shows “Youth Barriers” while the right column has the “Youth at Risk” questions. Youth Barriers” while the right column has the “Youth at Risk” questions. The “Youth at Risk” questions are indicators the youth has additional issues that need to be addressed.
- 4) Local Workforce Investment Boards are encouraged to review their locally-defined (**Needs Additional Assistance/Faces Serious Barriers to Employment**) Youth barrier definition to ensure it is flexible enough to allow appropriate youth applicants to be

screened in as opposed to being screened out. The local definition could be as simple as **“Lacks sufficient experience, education or skill to obtain employment in their chosen occupation.”**

Entering Youth Using WIR Locally Defined Barrier into Toolbox2.0

If a region is using the WIR defined (Needs Additional Assistance based on the 6th eligibility defined barrier as the barrier for eligibility then check the Youth WIR Defined box as indicated in the screen shot.

1. Check the Youth WIR Defined box (circled below) on “Barriers” popup
2. Complete the matching “Verification” checkbox/statement on the “Check Verification” popup.

The screenshot shows the 'Youth Barriers' pop-up window. The 'Eligibility' tab is selected. The window contains two columns of barriers, each with a dropdown menu set to 'No':

- Left Column:** Pregnant or Parenting, Foster Child, Homeless, Dropout, Runaway, Offender, Basic Skill Deficient, One or more grade levels below appropriate for age.
- Right Column:** Needs Additional Assistance, Migrant Youth, Aged out of Foster Care at 18 or received 1 year TAL after 14, Incarcerated parent, Behavior problems at School, Family illiteracy problems, Domestic violence, Substance abuse, Limited English proficient, Lacks occupational goals/skills, Disabled, Chronic Health Conditions including Disabilities.

At the bottom left, the 'Youth WIR Defined' checkbox is checked and circled in red, with the '5% Other' checkbox below it. At the bottom right are 'Save' and 'Close' buttons.

*Figure 33: Eligibility
Youth Barriers Pop-up Screen*

- 5) Youth aged 22-24 will use this list to show barriers to employment.
- 6) Click on the **“Save”** button

General Verification and Youth Verification Information

The screenshot shows the 'Check Verification' window with two tabs: 'General' and 'Youth'. The 'General' tab is active. It contains several sections with checkboxes and text input fields. Red boxes with numbers 2 through 5 point to specific elements: 2 points to the 'General' tab, 3 points to the 'Disability Status' checkbox, 4 points to the 'To be completed' text box, and 5 points to the 'Save' button at the bottom right. The 'General' section includes checkboxes for 'Identity' (checked), 'Citizenship / Employment Status' (checked), 'Age' (checked), 'Disability Status' (unchecked), and 'Veteran Status' (unchecked). Below these is a text box labeled 'To be completed'. The 'WMA / WMA Adult / Youth' section includes checkboxes for 'Family Size' (checked), 'Last 6 Months Income' (checked), 'Selective Service' (checked), and 'Categorically Eligible' (unchecked). The 'WMA Dislocated Worker / NEG' section includes checkboxes for 'Dislocated Worker Status' (unchecked) and 'Layoff Date' (unchecked). The 'Displaced Homemaker' section includes a checkbox for 'Income' (unchecked) and a text box for 'Meets All Three Definitions'. The bottom of the window has 'Save', 'Cancel', and 'Close' buttons. A status bar at the very bottom shows 'Record: 1/1' and '<OSC>'.

Figure 34: Eligibility
General Check Verification Pop-up Screen

Step-by-Step:

- 1) The “Check Verification General” pop-up screen opens when the case manager selects the “Check Verification” button on the Eligibility screen (**Figure 19, CVB**). This screen must be completed before the job seeker is eligible for program services.
- 2) “Check” the boxes for the documents received from the job seeker that is required to verify information such as “Identity”, “Citizenship”, and/or “Age”.
- 3) If a box is grayed out the case manager cannot check the box since there is not a need to verify that information.
- 4) If boxes are checked, the free flow comments text box must be completed.
- 5) Click on the **“Save”** button.

Youth Check Verification Tab

**Figure 35: Eligibility
Youth Check Verification Pop-up Screen**

Step-by-Step:

1. The “Youth Check Verification” pop-up opens when the staff selects the “Youth” tab. This screen must be completed before the job seeker is eligible for Youth program services. This tab will not be available if the job seeker is not a Youth.
 - 1) “Check” the boxes for the documents received from the job seeker that is required to verify information such as “Identity”, “Citizenship”, and/or “Age”.
 - 2) If a box is grayed out the case manager cannot check the box since there is not a need to verify that information.
 - 3) After each section there is a free format text box that the case manager must complete if boxes in that section were checked.
 - 4) Click on the **“Save”** button
2. When the desired programs are highlighted in green and the box(s) are checked the case manager enters “today’s date” in the “Eligibility Verification Date” text box. This freezes the record. The eligible programs populate on the “Enrollment” screen in the Eligible Enrollments section.
3. Double Check the following:
 - a. Are there green highlights and check marks in the box beside the appropriate programs? If not, be sure to complete and “Save” both “General” and “Youth” tabs of the “Check Verification” button. If there is not a green highlight, an appropriate barrier may not yet have been selected for the job seeker.
 - b. If the job seeker is to be “Income Eligible,” is the “Low Income” box checked?
4. Click on the **“Save”** button. This freezes the record. The eligible program populate on the “Enrollment” screen in the Eligible Enrollments section.

The Eligibility Enrollment Tab screen is used to enroll job seekers in programs for which they are eligible and qualify for. This screen shot shows the NGJT (both the 15% and 85% eligibilities) and WIA choices.

Toolbox 2 (Training) - Eligibility

File Edit Navigation Options Utility MO Utility Window Help

Eligibility - JULIA PHILLIP

Application Eligibility Waiver ATAA Enrollment

Eligible Enrollments

DVD Eligibility

- ☐ WIA Youth
- ☐ WIA Adult
- ☐ NGJT 85%
- ☐ NGJT 15%

Verify Date: 05/01/09

Referral System Programs

Ref Dt	DCN ID	Teen	Two

Other Potential DVD Programs

Enroll

Search MQ

Show Closed

Add

Delete

Actual Enrollments

Program	Start Dt	End Dt	Teen	Two	Outcome

External Counselor

Save Cancel

Record: 1/1 <ESC>

Figure 36: Eligibility Enrollment Screen

Enrollment Screen

The screenshot shows the 'Toolbox 2 (Training) - Eligibility' window. The 'Enrollment' tab is selected. The interface includes a menu bar (File, Edit, Navigation, Options, Utility, MO Utility, Window, Help) and a toolbar with various icons. The main area is divided into four sections:

- Eligible Enrollments:** Contains a 'DWD Eligibility' list (1) with checkboxes for 'WIA Adult' and 'NGJT 15%'. Below it is a 'Verify Date' field set to '06/01/09'.
- Referral System Programs:** A table (2) with columns 'Ref Dt', 'DCN ID', and 'Teen|Two'.
- Other Potential DWD Programs:** A list (3) with checkboxes and an 'Enroll' button (4).
- Actual Enrollments:** A table showing enrolled programs. The first row is 'WIA Youth' with 'Start Dt' '06/01/09' and 'Outcome' 'WIA Youth'. The second row is 'NGJT 85%' with 'Start Dt' '06/01/09' and 'Outcome' 'NGJT 85%'. An 'Oops!' button (5) is next to the 'Outcome' column.
- Buttons:** 'Add' and 'Delete' buttons are on the right. 'Save' (6) and 'Cancel' buttons are at the bottom right.

Figure 37: Eligibility Enrollment Screen

Step-by-Step:

- 1) “DWD Eligibility” section lists programs that the job seekers have passed the eligibility requirements. Determine which NGJT program is most appropriate for the job seeker to participate. NGJT Programs show in this section after eligibility has been determined in Toolbox 2. Check the box next to the program and click on the “Enroll” button to enroll.
- 2) “Referral System Programs” section displays referrals from other system that have determined eligibility for programs. Check the box next to the program and click on the “Enroll” button to enroll job seekers in this program.
- 3) “Other Potential Programs” lists programs that do not require use of the Eligibility screen or a partner system to determine eligibility. Check the box next to the program and click on the “Enroll” button to enroll.
- 4) The “Actual Enrollments” section shows the program(s) the job seeker is actually enrolled in.
- 5) The “Oops!” button can be used to un-enroll an actual enrollment when an enrollment has been enrolled in error. **The “Oops” button only works the day the enrollment is made.**
- 6) Click on the “Save” button

Employment Plan Tab Screen

- 1) Listed below are the **Allowable Objectives and Services** for the **NGJT Youth**.
- 2) Make sure to use the youth services with the “R” (*R designates it is a service only for the NGJT recovery act programs*) after the service number. If services are not chosen with the number plus the R, performance will be counted in common measures. **Be very attentive to what services are being used because there will be no change requests to correct staff error.** This is especially important to note if youth is dually enrolled in a year round WIA Youth or WIA Adult program.
- 3) If enrolling in **NGJT Youth Recovery Act program** that goes beyond September 30, 2009, the services must be kept current to keep them active and avoid the gap in service soft exit.
- 4) Notes are required along with the entry into services.
- 5) Objectives: Youth Services
Services: 503R Summer Youth Employment Opportunities*
 507R Youth Supportive Services
 511R Youth Assessment
 512R Youth ISS/Employment Plan
- 6) Youth Follow Up requires another enrollment. If Regions choose to do follow up:
 - a) Choose Other Potential DWD Program, double click in box and choose WIA Recovery Act Follow Up, then click on Enroll button.
 - b) Go to the Employment Plan Tab Objective and choose WIA Youth Follow Up. The 509R Youth Follow up Services is the choice for ARRA summer youth program.

*503R is the Work Readiness Indicator for NGJT summer program. Outcome choices for this will be:

- a. Achieved Work Readiness,
- b. Did not Achieve Work Readiness,
- c. Service in Error.

Figure 38: Employment Plan Screen

Step-by-Step:

1. Enter a "Start Date".
2. Enter an "O*NET" code by double clicking on the text box. The O*NET codes chosen in the registration under the "Desired Job Titles" will appear. If new O*NET codes are needed, click the cancel button and there will be a prompt to choose from all O*NET codes. (Next Generation Jobs Team may not know the job placement at time of Enrollment. Use an O*NET code that is closest to their interest of field of study. When the job placement has been made, re-enter the O*NET code to coincide with the placement.)
3. When the summer employment is assigned to the youth, then the service 503R Summer Youth Employment Opportunity is entered, the employer FEIN number, the hours box (weekly number to be worked) and the start date are completed.

The screenshot shows the 'Employment Plan' tab of a software application. The interface includes several sections: 'Start Date' (04/10/09), 'Closed' (empty), 'ONet' (35-2015.00), 'Goal' (Achieve self sufficiency as a cook or chef.), and 'Justification' (This is an occupation with some chance for advancement.). Below these are 'Objective' (Youth Services) and 'Service' (503R Summer Youth Employment O). The 'Task 1' text box is circled in red. To the right of the 'Task 1' box are buttons for 'Comp: + Add Task' and '- Del Task'. At the bottom right are buttons for 'Del Service' and 'Del Task'.

4. Enter an "Employment Goal" in the text box.
5. Enter a "Justification" to explain the employment plan goal in the text box.
6. **DO NOT enroll youth in services until the individual is ready to begin the services. This is especially true for those who will be in Work Readiness only beginning May 1, 2009 and ending September 30, 2009.**
7. Enter an "Objectives" and a "Services" by double clicking in the text box for a list of values. Use "Objectives" and "Services" to build the outline of the plan. Objectives/Services can be closed when the job seeker has completed all the tasks related to the objective/service. Click the "Add Service" or "Del Service" buttons to add or delete objectives/services. **Do not type services directly into the employment plan. Enter them only by double clicking in the "Objective" box and selecting activities from the resulting popup.**
8. Once Objectives and Services are selected; a "Task" text box will appear (**inset above with circle**). "Tasks" allow more specific detail about how the job seeker will meet each Objective/Service. Tasks are used to detail how the job seeker will achieve each section of their employment plan. Tasks can be set as completed (Y) or not completed (N). Click the "Add Task" or "Del Task" buttons to add or delete tasks.
9. Enter "End Date" (**enter the actual date of closure and not before**) and "Outcome" to close.
10. Click on the **"Save"** button

The **Employment Plan-Closures Tab Screen** provides Staff the ability to close Services, Enrollments and the Employment Plan from one screen.

1. Closures tab

2. End Date field in Employment Plan section

3. Enrollments section

4. Show Closed Services checkbox

5. Show Closed Enrollments checkbox

6. Save button

Figure 39: Employment Plan Closures Screen

Step-by-Step: Closure Tab

1. The “Services” section displays all of the open services for the current employment plan.
2. The “Employment Plan” section only displays the employment plan start date. To close the plan, enter the End Date the date service ends **and not before**) and Reason for closure. The Plan Closure Comments field is optional and Reason is selected from a list (LOV). Employment plans cannot be closed if there are open services and other program enrollments.
3. The “Enrollments” section displays all of the open enrollments. To see closed enrollments click the “Show Closed Services” box. To close enrollment enter an End Date and Outcome. The Comments field is optional and Outcomes are selected from a list of values.
4. Summer Work Experience should be **closed no later than September 30, 2009** to count as the Summer Youth work experience program.
5. **If an NGJT participant age 18-24 is enrolled in work experience only, a 6 month extension is allowed. The end date for the extended Work Readiness Measurement is March 31, 2010.**
6. Click on the “Save” button.

Seeker Services Tab

**Figure 39: Seeker Histories
Seeker Services Screen**

1. Seeker Services shows enrollment into the program and all services NGJT youth was entered and the dates of those entries.
2. Each time a youth visits the career center any service or task must be recorded in the chart to keep the individual an active participant.
3. The Results column shows the status of an enrollment and/or a service.

Exit Snapshot Tab

Exit ID	Enrollment Date	Client ID	Program
1007996439	10/06/2007	13457467	WIA Youth

Pend Exit Date: 06/16/2009 Birth Date: 08/22/1990

Save Cancel

Intake Information

Employed:

UI Status:

Displaced Homemaker:

Dislocated Date:

School Status:

High Grade:

Veteran:

Vet Status:

Mil Beg Date:

Mil End Date:

Vet Campaign:

Vet Disabled:

Outcome Information

Exit Date: Exit Reason:

Employer:

Emp Addr:

Emp City:

Emp State: Emp Zip:

Emp Phone:

O*NET:

Emp Date:

Wages/Hr:

Hrs/Week:

Exit Onet:

Onet Code:

Documented Employment

Employed Qtr Post Exit:

1st: 2nd: 3rd: 4th:

Train Rel Emp:

Non-Trad Emp:

Youth Specific

Exit School Status:

Certificate/Degree:

Date Attained:

Enrolled in Education:

Youth Placement 1st Qtr:

*Figure 40: Seeker Histories
Exit Snapshot Screen*

Step by Step Exit Snapshot

1. Exit ID

1. If there is more than one exit listed, click in the row of the exit you want to work with. That will change to other data on the screen to show those data elements associated with the selected exit.

2. Intake Information

None of the fields in the Intake Information area are editable.

3. Pend Exit Date

1. This field displays the date that the soft exit will (or did) occur. It is generally 90 days later than the last countable service, but there are two exceptions.

2. If the WIA participant is also enrolled in CAP or PFS, the field will display a date 90 days later than the current date. Once the CAP or PFS enrollment is closed, the field will display a date 90 days later thanThe CAP or PFS program closure date.

3. If the WIA participant is enrolled in one of the long-term training or education services that keep a record from exiting until the service is closed, the field will display a date 90 days later than the current date. Once the long-term service is closed, the field will display a date 90 days later than the service closure date.

4. Exit Date

1. This is the system-generated, official common measures exit date that will be reported to USDOL and is equal to the date of last countable service, CAP or PFS program closure date, or WIA long-term training or educational service closure date.
2. This date will frequently not match the WIA program enrollment closure date, as there are many other services that can have an effect on the final common measures exit date.

5. Outcome Information

1. The Employer, Emp, Addr, Emp City, Emp State, Emp Zip and Emp Phone fields are for case management and follow-up purposes only.
2. The Emp Date, Wages/Hr and Hrs/Week fields are used for the predictive reporting function in the MoPerforms tool used by Regional and State-level management. These fields are also useful for case management purposes.
3. The Exit O*NET and O*NET Code fields are system-generated after staff chooses the employment O*NET from the O*NET dropdown list.
4. The O*NET dropdown list displays all O*NET codes contained in the system. Staff must choose the appropriate O*NET of the individual's employment, as this is a Federal reporting requirement.

6.Documented Employment

1. These are Y/N fields to report documented employment in the first, second, third and fourth quarter after exit. These fields are to be used for the reporting of Supplemental Data to prove employment for performance outcome calculation. The fields are protected so that staff cannot post an outcome in a quarter until the participant has reached that quarter after exit.
2. The Train Rel Emp field is used to post the federal reporting outcome, Training Related Employment.
3. The Non-Trad Emp field is used to post the federal reporting outcome, Non- Traditional Employment.

7.Youth Specific

1. An outcome for the Exit School Status field must be posted, as this is a Federal reporting requirement .It should be consistent with the outcome posted in the Youth Placement 1st Qtr field.
2. The Certificate/Degree field is used to post outcomes for the Attainment of a Degree or Certificate.
3. Youth Performance Measure Documentation of the degree, diploma or certificate must be obtained before posting an outcome in this field.
4. The Date Attained field is used to report the date a youth attained the degree, diploma or certificate and is used in the calculation of the performance measure, Attainment of a Degree or Certificate. Documentation of the date the degree, diploma or certificate was attained must be obtained before posting an outcome in this field.

NOTE:

The Certificate/Degree and Date Attained fields are the only fields that are used to calculate the Youth performance measure, Attainment of a Degree or Certificate (either during participation in the program or by the end of the third quarter after exit). Any other fields in Toolbox 2.0 related to degrees, diplomas or certificates are for case management purposes only.

8. Enrolled in Education

This field is to be used to indicate if a Youth participant becomes enrolled in education after the Youth registration was created. This is a federal reporting requirement and will be used, in conjunction with the Current Education Status field on the Eligibility screen's Eligibility tab, to determine who is in the Attainment of a degree or Certificate performance measure.

9. Youth Placement 1st Qtr

Use this field to report outcomes used to calculate the Youth performance measure, Placement in Employment or Education. DWD will determine Employment outcomes through the Wage Match, or the region will need to provide Supplemental Data to prove employment.

Addenda

Next-Generation Jobs Team Program Toolbox 2.0 Enrollment Process and Performance Reporting Clarification

Additional Services have been added in Toolbox 2.0 relative to Youth participants. Please reference the following guidelines for utilization.

If the Youth is to be enrolled in the Summer Program only, staff must:

- complete the Eligibility and create the NGJT 85% or 15% Actual Enrollment; and
- post the appropriate New Generation Jobs Team Services (503R, 507R, etc).

This Youth will only be measured by the Work Readiness indicator (as long as the work experience ends by March 31, 2010). ITSD will be able to identify these individuals by both the NGJT Actual Enrollment and the “R” service.

If the Youth already has a WIA Youth Actual Enrollment, and are to participate in the 15%

ARRA-funded Summer Employment Program, staff need to:

- complete a new Eligibility;
- create a 15% NGJT Actual Enrollment; and
- post the appropriate New Generation Jobs Team Services.

ITSD can identify these 15% participants for inclusion in the Work Readiness performance report by the “R” service.

If the Youth already has a WIA Youth Actual Enrollment, and are to participate in the 85%

ARRA-funded Summer Employment Program, *staff do not need to create a NGJT Actual Enrollment.*

The “R” service can simply be posted to the existing WIA Youth Actual Enrollment.

ITSD can identify these participants for inclusion in the Work Readiness performance report by the “R” service.

If the Youth has an Actual CAP, WIA Adult, or other Actual Enrollment in TB2 and are to participate in either the 15% or 85% Summer Employment Program, staff must:

- complete a new eligibility and Summer Youth Actual Enrollment.

If the Youth previously had an Actual Youth Enrollment that exited and are to participate in either the 15% or 85% Summer Employment Program, staff must:

- complete a new eligibility and Summer Youth Actual Enrollment.

Entering Summer Youth Using Locally Defined Barriers Updated 5/7/09

On May 1st, you were sent an email describing the Toolbox2.0 work-around process to enroll Youth participants that meet the local WIB-Defined Barrier. The coding of Toolbox2.0 functionality necessary to report this barrier has now been implemented. Therefore, staff may now indicate the “Youth WIR Defined” barrier by checking the box on the Youth Barriers screen in Toolbox2.0 (see screen below).

The previous guidance instructed you to choose the “homeless” barrier checkbox in Toolbox2.0. Doing so allowed you to complete the data entry process necessary for enrollment and service provision. You were also instructed to make the following notation in the document verification text field: “Customer is not homeless -- Needs Additional Assistance (WIB Defined) (i.e. Documentation meeting Local Plan Requirements).” This explanation was needed to account for the use of the “homeless” barrier instead of a “WIR locally defined barrier” in the system. You were also instructed to keep a list of the Toolbox2.0 appIDs of youth who are truly homeless. Now that ITSD has completed the Toolbox2.0 barrier updates, we are asking you to provide your list of truly homeless participants entered. Please send this list to dwdsupport@ded.mo.gov. ITSD will then correct the records for “WIR locally defined barrier” participants entered as homeless, without changing those on your list as “truly homeless”. Local Workforce Investment Boards are encouraged to review their locally-defined (Needs Additional Assistance/Faces Serious Barriers to Employment) Youth barrier definition to ensure it is flexible enough to allow appropriate youth applicants to be screened in as opposed to being screened out. The local definition could be as simple as “Lacks sufficient experience, education or skill to obtain employment in their chosen occupation.”

Entering Youth Using WIR Locally Defined Barrier into Toolbox2.0

1. Check the Youth WIR Defined box (circled below) on “Barriers” popup
2. Complete the matching “Verification” checkbox/statement on the “Check Verification” popup.

The screenshot shows the 'Youth Barriers' popup window. The 'Eligibility' tab is selected. The 'Youth WIR Defined' checkbox is checked and circled in red. Other barriers listed include Pregnant or Parenting, Foster Child, Homeless, Dropout, Runaway, Offender, Basic Skill Deficient, One or more grade levels below appropriate for age, Needs Additional Assistance, Migrant Youth, Aged out of Foster Care at 18 or received 1 year TAL after 14, Incarcerated parent, Behavior problems at School, Family illiteracy problems, Domestic violence, Substance abuse, Limited English proficient, Lacks occupational goals/skills, Disabled, and Chronic Health Conditions including Disabilities. The 'Save' and 'Close' buttons are at the bottom.

REVISED 250%
Lower Living Standard Income Level (LLSIL)
Maximum Income Level for the Next-Generation Jobs Team
15% Pilot Demonstration Project

Family Size	Kansas City Area	St. Louis Area	Remainder of State
1	\$29,230	\$28,748	\$28,658
2	\$47,915	\$47,095	\$46,943
3	\$65,790	\$64,645	\$64,443
4	\$81,198	\$79,793	\$79,543
5	\$95,825	\$94,168	\$93,885
6	\$112,068	\$110,115	\$109,793

The Kansas City area consists of the East Jackson County and Kansas City and Vicinity Regions.

The ST. Louis area consists of Jefferson/Franklin, St. Charles County, St. Louis City, and St. Louis County Regions.

For families larger than 4 in Kansas City add \$16,243 for each additional member.

For families larger than 4 in St. Louis add \$15,947 for each additional member.

For families larger than 4 in the remainder of Missouri add \$15,908 for each additional member.

Work Readiness Certificates

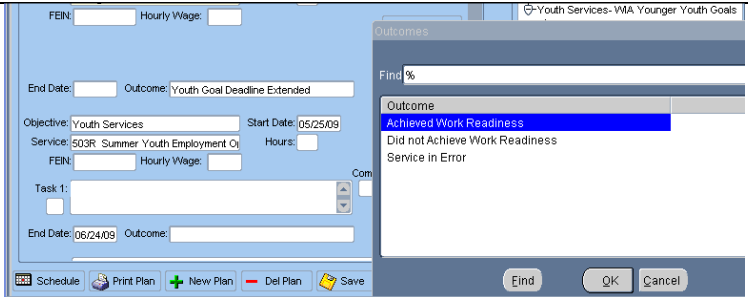
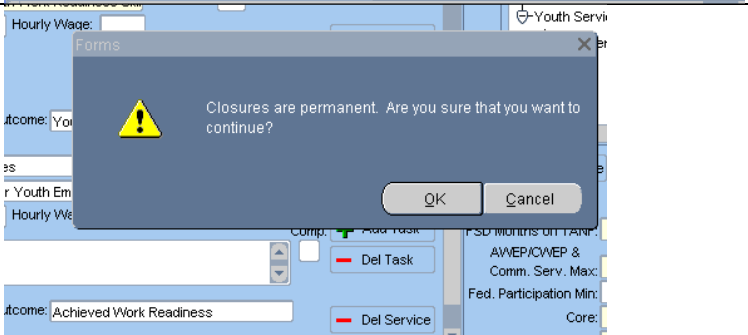
Toolbox 2.0 provides the function of printing a “Work Readiness Certificate” for any customer who receives an “Attained Work Readiness” outcome when completing the 503R Service.

After the service is ended and the outcome saved, a popup will appear offering the option to print the certificate. If an affirmative answer is given, a PDF document will open containing the customer’s information to print on the blank certificate form. ***This will be your only opportunity to print the certificate.***

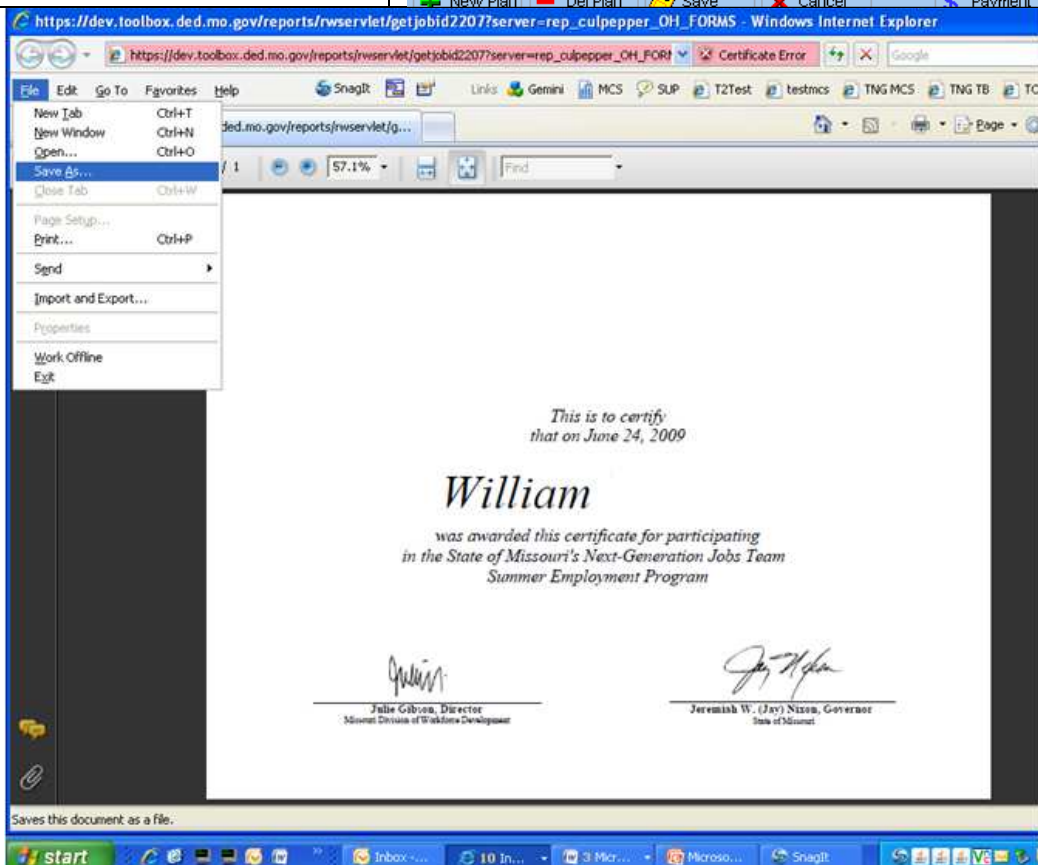
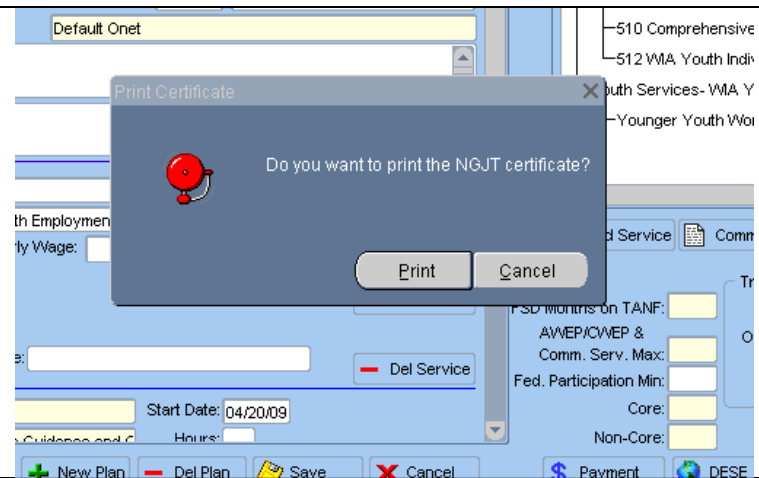
Blank certificates will be provided to each area as soon as they are printed. ***Until then, you must save the certificate information PDF file.***

In many cases, it may not be convenient to print the certificate at the same time the service is ended, but it is important to remember that ***the system will only allow the PDF document to appear at the time the service is ended.***

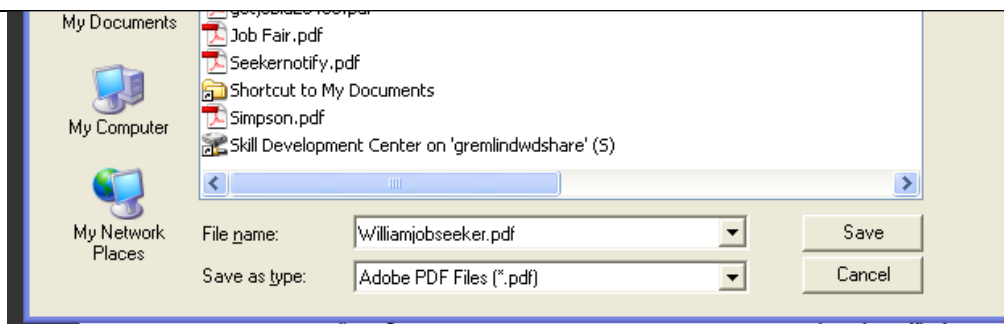
To provide more flexibility in printing these documents, it is recommended that the PDF be saved so that the certificate may be printed at your convenience. This also offers the option of allowing duplicate certificates to be printed at a later date.

<ol style="list-style-type: none"> 1. Enter the end date. 2. Choose “Achieved Work Readiness” from the outcome LOV. 	
<ol style="list-style-type: none"> 3. Click “OK.” 4. Click “Save.” 5. Click “OK” to “Closures are Permanent.” 	

6. Select "Print" to the popup
"Do you want to print"



7. Access the PDF document and click on the "Save As"



8. Name the document with the Customer's Name and save to a new folder.
9. The document can now be retrieved and printed at any time.

